# Instructions for Advisor/Assessor Training and Certification Record

This document should be completed by the State Trainer responsible for conducting the first portfolio review with the Assessor-in-Training.

1. Name of Advisor/Assessor as it should appear on the Advisor/Assessor certificate
2. Name of Trainee’s Agency
3. Agency Phone #
4. Trainee’s email address
5. Training Module Dates
   1. CASAS IT date is usually shared with state trainers during training and can be obtained from Christine O’Hara (cohara@casas.org).
   2. The record must verify that all training modules have been completed by the trainee. A recording or power point presentation for either module one or five (but not both) may have been viewed and a reflection written by the trainee in lieu of attendance.
   3. Trainees who were trained in three days rather than over five modules should have the dates of their three day training spread over the five modules.
6. Trainee Client Work
   1. The State Trainer can obtain the diagnostic client number from the trainee’s site administrator. CASAS staff will verify that the trainee was the assigned Advisor for this client.
   2. Client number of the assessment client for whom the first portfolio was reviewed for the state trainer.
   3. Indicate “T Trainer” for any competency areas that are credited through evaluation of the T Trainer competency areas and attach the *T Trainer Master Scoring Document*.
7. State Trainer Portfolio Review
   1. Date review completed should match the completion date on the client’s “outcome data” page in the WEU.
   2. Name of State Trainer completing review
   3. State Trainer’s agency
8. Completion- CASAS staff initial and date will verify the following have been completed:
   1. CASAS IT Certification
   2. Advisor role completed
   3. Assessor role completed
   4. Portfolio Review was conducted by a certified state trainer
9. Trainer name, signature, and date form is completed.
10. Form mailed to [nedp@casas.org](mailto:nedp@casas.org) or faxed (858-292-2910) to CASAS: Attn: NEDP. Upon verification by CASAS/NEDP, a certificate will be issued and emailed to the newly certified Advisor/Assessor. The Advisor/Assessor is responsible for sharing his/her certification status with site administrator, state trainer, and/or officials from the state or local diploma-granting agency.